External roles for eBusiness suite

1. Provider designated signatory

The person who is assigned this role will be able to accept or reject electronic contracts for signature. This role is for the person with a high level of authority in the firm, usually the fee earner or partner. This is most likely to be the person who signed the unified contract. – If the firm has multiple accounts then this role should be assigned to the lead account.

2. Provider firm manager

The person assigned this role will normally have responsibility for managing the firm's performance. They will be able to view financial statements, KPI reports etc for the whole firm and for individual offices within the firm. They will be able to view and print out previous submissions and search for individual outcomes for the whole firm. – If the firm has multiple accounts then this role should be assigned to the lead account.

3. Provider office manager

This person will have the same level of responsibility as the provider firm manager but their access will be limited to an individual office. They will be able to view and print previous submissions and search for individual outcomes for their specific office only.

4. Provider activity reporter

This role is for the individuals who enter new outcomes and/or bulk load outcomes. This may be the responsibility of the person who manages the case, i.e. the caseworker or solicitor. This role will enable the user to view and print previous submissions and search for individual outcomes for that particular office. This role is only suitable for people who complete the submission but **do not** submit to the LSC. – If the firm has multiple accounts and the individual requires the role for all accounts, then it should be assigned to the lead.

5. Provider activity reporter manager

The person who completes and submits the submission to the LSC will carry out this role. It will enable the user to manually enter new outcomes and bulk load outcomes, as well as view and print previous submission and search for individual outcomes for the office. This role is suitable if it is the responsibility of one person to complete **and** submit, or for the person who's responsibility it is to make the final submission to the LSC once the information has been completed by other members of the team (i.e. the provider activity reporter). – If the firm has multiple accounts and the individual requires the role for all accounts, then it should be assigned to the lead.

6. Provider firm system administrator

This is a high-level administrative role for the person with responsibility for setting up new users, assigning new roles to users (i.e. granting access levels to information) and changing passwords. This person will also be able to restrict users to specific offices so that a firm can have more than one provider reference data clerk for example, with each person having access to only one office. – If the firm has multiple offices and the individual requires this role for all offices, then it should be assigned to the lead.

7. Provider reference data clerk

This role can update advanced contact and equalities information. For example changing the firm or office address and contact details. This role would be suitable for an office manager or firm secretary. – If the firm has multiple accounts and the individual requires the role for all accounts, then it should be assigned to the lead.

Individuals can be assigned multiple roles, depending on their responsibilities and the size/structure of the firm. For example a sole practitioner could have the roles:

Provider designated signatory
Provider firm manager
Provider activity reporter manager
Provider firm system administrator
Provider reference data clerk